

# ROBISEARCH LIMITED

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## ROBIPOS POINT OF SALE SYSTEM

### Advantages of Robipos POS

1. Very fast customers checkout.
2. Elegant and fast invoicing that can be printed or emailed to your clients.
3. Know how much stock you have and when you need to order new stock
4. Fast purchase order generation that can be emailed to suppliers instantly
5. Identify your dead stock to enable you to deal with it
6. Identify your near expiry stock and sell before it expires
7. Identify your busy periods by month, week, day, day

of week and even hour of the day

8. Compare your sales by year, month, week, day or even day of week

9. Help you to allocate staff hours efficiently thus saving you money

10. Have the right stock always, so no over stocking that tie up your cash, or under stocking to lose customers to your competitors

11. Collect your money on time by sending email reminders and statements to clients

12. Cut down your accountant bills by providing your accountant with precise information

13. Identify your good staff and reward them to help boost your sales

14. Process credit card on the net saving you line rentals and expensive operator mistakes

15. Generate more sales using the built in emailing to send promotions to existing clients

16. Know your business financial position at any time by the press of a button

17. Barcode your stock to help eliminate errors and speed up the sales process

18. Combine different part numbers for the same stock under one code

19. Order stock from your suppliers using their own part numbers and much more....

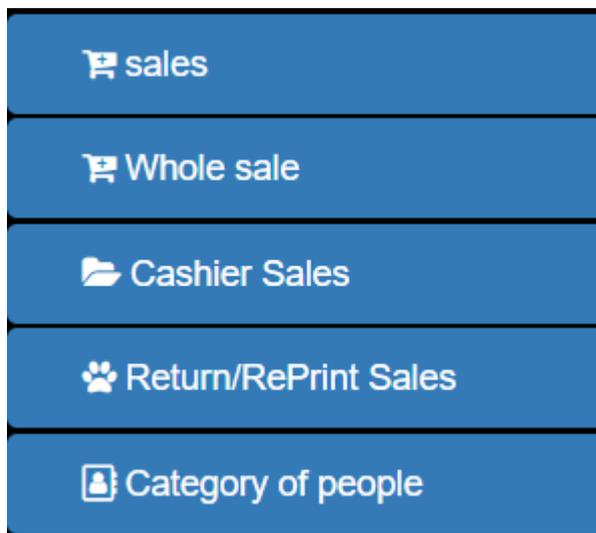
# TABLE OF CONTENT

How do I make a sale? .....	6
How to configure the system so that your receipt has your business details .....	11
WHOLESALE .....	14
CATEGORY OF PEOPLE .....	15
HOW TO ADD A BRANCH. ....	17
HOW TO ADD AND MANAGE People/contacts.....	18
How to add a user .....	22
Category of products .....	25
STOCKLIST (COUNTER) .....	29
Product main store .....	34
Manage Report .....	35
Incoming stock list .....	36
Issued store items.....	38
Low stock list.....	38
Low store.....	39
ACCOUNTING .....	40
Purchases .....	44
EXPENSES .....	50
Bank deposits.....	54
Damaged products.....	57
Display sales report.....	58
Grouping members .....	60
Send sms .....	61
Documents .....	64
Task category .....	66
Tasks.....	67
Call centre .....	69
Complains.....	72
Events.....	73
Change password .....	76
Contact us for enquiries,.....	77



## How do I make a sale?

Click on sales module which is on the dashboard



Enter the code or name of the product, enter the quantity of the product being sold, then click on add sales button. Select the mode of payment and enter the amount of money paid by the customer. Then click print or don't print.

Click print if you can print the receipt and press don't print if you don't have a printer.

Code	Qty	Disc	Mode	Add	
<input type="text" value="Enter code or name"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	AMT	<input type="button" value="Add sales"/>	
Item Name	Unit	Qty	Disc	S Price	Total
Total					<input type="button" value="Suspend"/>

2547

Cash ---Select Customer/Waiter---

CASH-F3

MPESA-F4

CARD-F5

CREDIT-F6

VOUCHER-F7

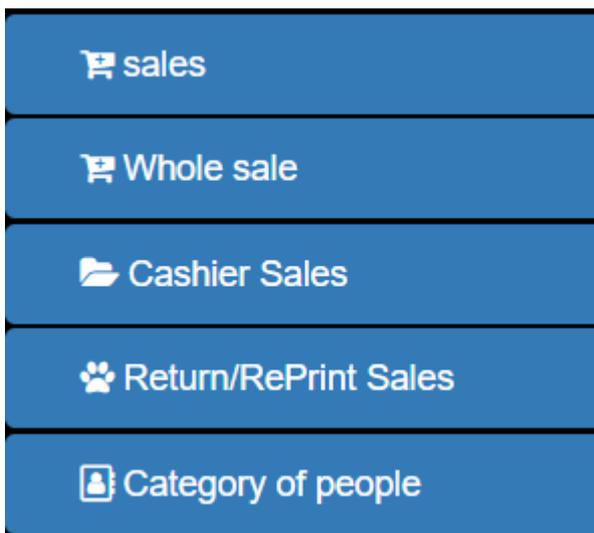
CHEQUE-F8

L POINTS-F9

CREDIT NOT-F10

CHANGE

Click on Cashier sales module.to view sales made by the cashier.



View the sales made.

RCT No	Ref No	Mode	Table	Total	Bal	Cash	Mpesa	Card	Voucher	Credit	Points	Cheque	Code	Customer	Date sold	Counter	Sold by	Status
10	11544420827-Print	Cash	<a href="#">view</a>	800	0	800	0	0	0	0	0	0			2018-12-10 08:48:27	Counter	Admin	No
Expected Amount: 600.00																		
Total for all payments : 600.00																		

1 Sales.

## How to return a good?

After making a sale, go to cashier sales module. Go to the product sold.

RCT No	Ref No	Mode	Table	Total	Bal	Cash	Mpesa	Card	Voucher	Credit	Points	Cheque	Code	Customer	Date sold	Counter	Sold by	Status
10	11544420827-Print	Cash	<a href="#">view</a>	800	0	800	0	0	0	0	0	0			2018-12-10 08:48:27	Counter	Admin	No
Expected Amount: 600.00																		
Total for all payments : 600.00																		

1 Sales.

Click on the “view” button

Table
<a href="#">view</a>

Click on return button then Click on the close bill button.

[Close Bill](#)

It will take you back to the sales button if one wants to exchange a product.

Code	Qty	Disc	Mode	Add	
<input type="text" value="Enter code or name"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	AMT	<input type="button" value="Add sales"/>	
Item Name	Unit	Qty	Disc	S Price	Total
Total					<input type="button" value="Suspend"/>

2547

Cash

MPESA-F4

CARD-F5

CREDIT-F6

VOUCHER-F7

CHEQUE-F8

L POINTS-F9

CREDIT NOT-F10

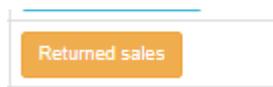
CHANGE

## View returned sales

If you want to view the returned sales or if a good was returned, Go to manage report module.

DETAILED REPORT		SUMMARY REPORT	
No	Name	No	Name
1	<a href="#">View Sales</a>	1	<a href="#">View Receipt Sales/All</a>
2	<a href="#">Sales Per Product</a>	2	<a href="#">Receipt Sales Per Person</a>
3	<a href="#">Sales Per Product Category</a>	3	<a href="#">Receipt Sales Per Customer</a>
4	<a href="#">Sales Per Person</a>	4	<a href="#">Money Mpesa Received</a>
5	<a href="#">Returned sales</a>	5	<a href="#">Search/View Mpesa Pending</a>
6	<a href="#">Fast/Slow moving goods</a>	5.1	<a href="#">Download Mpesa Contacts</a>
		6	<a href="#">Daily collection Report</a>
		7	<a href="#">User Logs</a>
		8	<a href="#">Activity logs</a>
		ACCOUNTING REPORTS	
		1	<a href="#">Trial balance</a>
		2	<a href="#">Balance sheet</a>
		3	<a href="#">Profit and Loss</a>
		4	<a href="#">Cash flow</a>
		5	<a href="#">General Ledger</a>

Click on the “returned sales” button.



## Another way to return goods

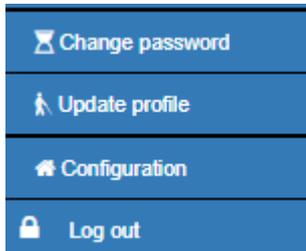
On the dashboard click on the “Return/reprint sales”.



Then enter the receipt number of the sales that you would want to return.

## How to configure the system so that your receipt has your business details

On the dashboard, click on the “configuration” button.



Update Your company details x

[Backup Database](#) [Chief's Message](#) [All Fiscal Year](#)

Business name/details	<h1>Business name</h1>
Phone 1 *	123456789 Enter contact e.g 254712345678
Phone 2 *	1234567 Enter contact e.g 254712345678
Country	Kenya
P.O BOX	*****
Email	business@gmail.com
Location	JUUA
Contact person	JOHNKINGSLY
Currency symbol	KSH
First TAX	VAT
First tax rate (%)	18
Second TAX	18
Second tax rate (%)	10
Display tax 1	yes
Display tax 2	yes
L.P.O Format	*****]

Description	1880 BAR & GRILL 264748297242  
Grand/Mass discount	no
Display Description?	no
Display Barcode?	no
Return policy	GOODS ONCE SOLD ARE NOT RETURNABLE
Invoice Terms	TERMS OF SERVICE 1. Grand total of Ksh. 25, 000 is payable once (One off payment). 
Mpesa Paybill	<h3><center> TILL NO.***** </center></h3>
Payment Types	CASH
Type of Receipt to display ?	Retail
Payment Mode?	Before Receipt
Default No of Receipt to print ?	Two Without Automatic Logout
Display	Enter display %
Default Shift Start day ?	Current
Default Shift Start time	00:00
Default Shift Close day ?	Current
Default Shift Close time	23:59
Fiscal Year	From 2018-01-01 00:00:00 To 2018-12-31 23:59:00
Company logo	<input type="button" value="Choose file"/> No file chosen
<input type="button" value="Update Setting"/>	

Enter the business name between the `<h1>` and `</h1>`

The phone number of the business in the fields. If the business has two phone numbers, enter one in **phone 1** and the second number on **phone 2**.

Enter the rest of the details too.

When you cheque the receipt you will notice that the details are displayed just the way you entered the details.

*In this example the business name was “**Business name**”.*

Item Name	Qty	Dsc	Price	Total
PORK	4.00	0	120	480
<b>TOTAL AMOUNT</b>			<b>480.00</b>	
<b>CASH</b>			<b>480</b>	
<b>CHANGE</b>			<b>0.00</b>	
<b>TAX RATE</b>	<b>VAT AMT</b>	<b>VATABLE AMT</b>	<b>EXEMPT AMT</b>	
<b>16.00%</b>	<b>66.20</b>	<b>413.80</b>	<b>0.00</b>	
<b>GRAND TOTAL</b>		<b>480.00</b>		

14/12/2018 ROBISearch POS

**BILL**

**Business name**

TELEPHONE 2: 0727518881

RECEIPT NO 20 REF NO:(Cash) 11544688043

DATE: 2018-12-14; TIME: 12:32:01pm

TILL NO:\*\*\*\*\*

SERVED BY: ADMIN (COUNTER)

GOODS ONCE SOLD ARE NOT RETURNABLE  
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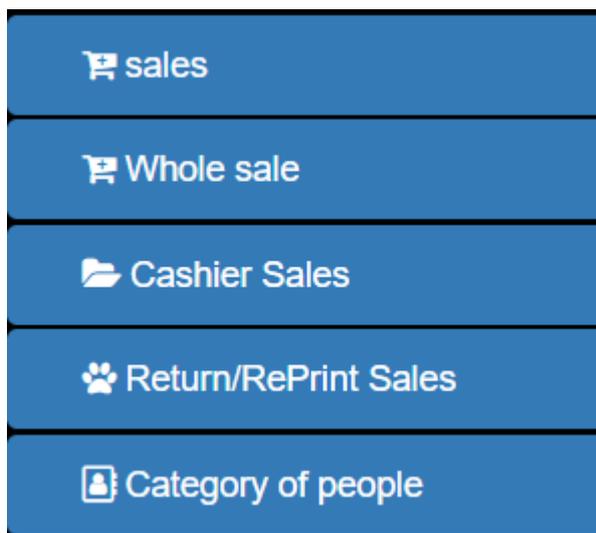
<http://pos.robisearch.com/user/printreceipts?invoice=11544688043> 1/1

## WHOLESALE

The wholesale module is just like the sales module but the difference is in quantity. The quantity of the product is in bulk.

For example, *when the quantity of a 1 crate of eggs can mean 32 eggs.*

Click on wholesale module.



The unit of measurement (UOM) is added when adding a product where the unit of measurement is given.

Enter the product code or name, the quantity then click on **add sale**. Then enter the payment and its mode and print the receipt if the business has a printer and click on “don’t print” if the business has no printer.

Code	Qty	Disc	Add		
<input type="text" value="Enter code or name"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="button" value="Add sales"/>	
Item Name	Unit	Qty	Disc %	S Price	Total
Total					<input type="button" value="Suspend"/>

View Pending/Received Payments	
Enter Phone No to verify	
Cash	<input text"="" type="text" value="cash"/>
MPESA-F4	<input type="text" value="0"/>
CARD-F5	<input type="text" value="0"/>
CREDIT-F6	<input type="text" value="0"/>
VOUCHER-F7	<input type="text" value="0"/>
CHEQUE-F8	<input type="text" value="0"/>
L POINTS-F9	<input type="text" value="0"/>
CREDIT NOT-F10	<input type="text" value="0"/>
CHANGE	<input type="text" value="0"/>
<input type="button" value="Print"/>	<input type="button" value="Don't Print"/>
<input type="button" value="Order"/>	

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## CATEGORY OF PEOPLE

This module is where you add the different employees of the organization. *For example cleaners, suppliers.*

Click on “category of people” module.

<input type="button" value="Return/RePrint Sales"/>
<input type="button" value="Category of people"/>
<input type="button" value="Branch"/>

Here you will be able to view all the categories of people that you'll have added.

Add Category/group View category/group

Success! You have successfully deleted this item!

10 records per page Search:

No#	Name	Old Members	Current Members	more
2	graduates	<a href="#">Old Group</a>	<a href="#">Current Group</a>	<a href="#">More -</a>
3	sweepers	<a href="#">Old Group</a>	<a href="#">Current Group</a>	<a href="#">More -</a>
4	Cooks	<a href="#">Old Group</a>	<a href="#">Current Group</a>	<a href="#">More -</a>

Click on “add category/group” to add a category or group. Enter the name of the category *e.g Cleaners* and then the description *e.g this category of people are supposed to clean the compound and the office*. Then click “add category” button.

Add new Category/group ✕

Name

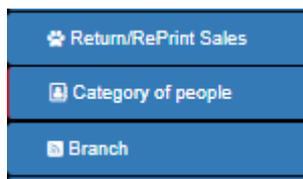
Description

[Add Category](#)

## HOW TO ADD A BRANCH.

A business can have several branches in different places. This module enables one to add the different branches.

Click on the “Branch” module.

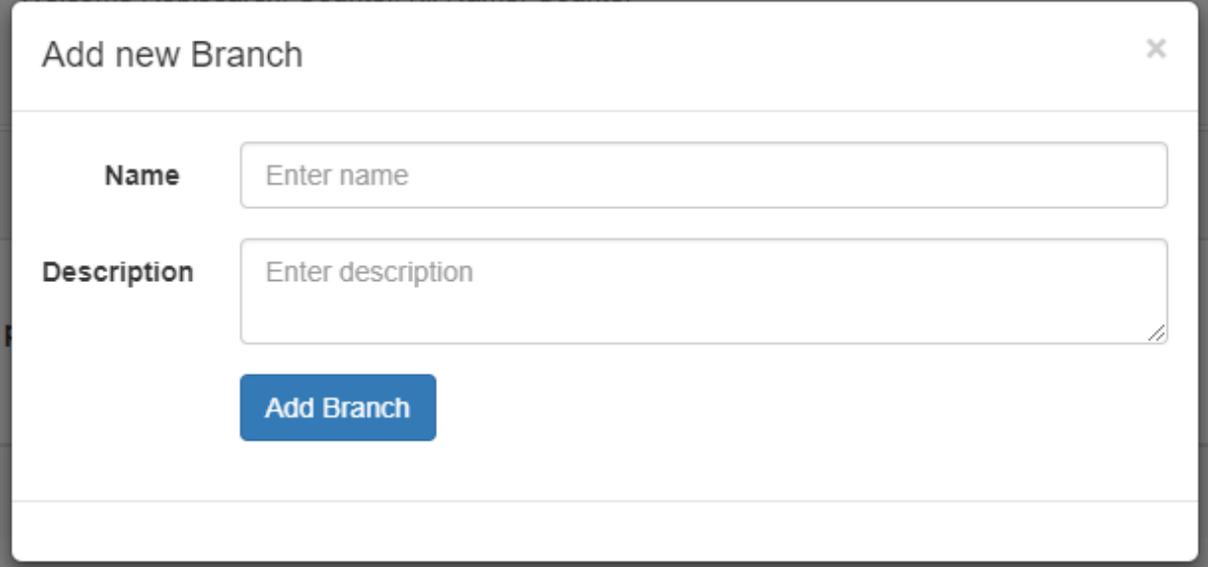


You’ll be able to view all the branches of your business if you’ve added them before.



Click on the “add branch” button. Enter the name of the branch *e.g Juja branch or Nairobi branch*. Enter the

description of the branch and click on “Add branch” button.



The image shows a web form titled "Add new Branch" with a close button (X) in the top right corner. The form contains two input fields: "Name" with the placeholder text "Enter name" and "Description" with the placeholder text "Enter description". Below the input fields is a blue button labeled "Add Branch".

## HOW TO ADD AND MANAGE People/contacts

This module enables you to add the people in your business into the system and group them.

Click on the “People/contacts” module



You'll be able to view all the people/contacts that you've added in the system.

<a href="#">Add Member</a>	<a href="#">View Supplier</a>	<a href="#">Member Bulk upload</a>	<a href="#">download bulk members template</a>	<a href="#">View</a>
----------------------------	-------------------------------	------------------------------------	--	----------------------

ALL MEMBERS

[Search](#) [Refresh](#)

#	Name	Email	Phone	ID Number	Company	status	Action	More
7	JULIANA		12345		jkuat	active	<a href="#">Edit</a> <a href="#">Group</a> <a href="#">PayRoll</a>	<a href="#">More ▾</a>
5	OPONDO		12345		AAA	active	<a href="#">Edit</a> <a href="#">Group</a> <a href="#">PayRoll</a>	<a href="#">More ▾</a>

Click on “add member” button to add a contact.

The form below will pop up. Enter the person’s details then click on “Add member” button.

In order to upload the members in bulk click on member upload, upload an excel file (preferably csv, comma delimiter, you’ll see this when saving the excel file) which has the details of the members.

If you need to download a template of how the excel sheet should look like click on “download bulk member template” button to see the order of the details of the people that you should enter in the excel sheet.

Add new Member/ Contact ✕

**Names\***

**Phone \***   
e.g 254712345678

**Phone 2**   
Other Number e.g 254712345678

**Company\***

**Gender**

**Country?**

**Email**

**ID Number**

**City**

**Zip Code**

**Website/Link**

**Entry date**

**Description**

When you want to group the person to a specific category/group, click on “group” button.

Last Name   
 First Name   
 Email   
 Phone   
 Group   
 Status

View category/group

This member

Name	From Date	U
[Redacted]		

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It will take you to the above page. Choose the group and the status of the person. Click on the “Assign to this group” button.

## How to add a user

This module deals with adding the employees of the business.

Click on “user” button.



You'll be able to view all the employees that you've added into the system



The screenshot shows a web interface for managing employees. At the top, there are two buttons: "Add Employee" (blue) and "Delete all Roles Employee" (red). Below these is a green success message: "Success! You have successfully Updated The data.". Underneath is a search bar with the placeholder text "Search for members..", a green "Search" button, and a blue "Refresh" button. Below the search bar is a table with the following columns: First Name, last Name, Email, Phone, ID Number, status, Action, and More. The table contains one row of data for an employee named Robert Ouko with email robiearoc@gmail.com and phone number 12345. The ID Number is masked with asterisks. The status is "active". The Action column has a blue "Roles" button, and the More column has a blue "More" button with a dropdown arrow.

First Name	last Name	Email	Phone	ID Number	status	Action	More
Robert	Ouko	robiearoc@gmail.com	12345	*****	active	Roles	More ▾

Click on “add employee” button. A form will pop up. Enter the details of the user then click on “Add user”.

### Add new User/ Contact ✕

**Last Name**

**First Name**

**Phone Number**

**Gender**

**ID Number**

**Status**

**Email**

**Password**

**Confirm Password**

When you want to give the users roles as the admin, click on “Roles” button. You’ll be able to give each user roles.

Action

## Category of products

In this module, the subcategory and main category of products are created.

Click on Category of products module.



After clicking on the module, you'll be able to view all the subcategories of products. *Subcategory examples are utensils where by the product is spoon. And the main category is supermarket.*

VIEW LOWEST CATEGORY OF PRODUCTS( No.2)

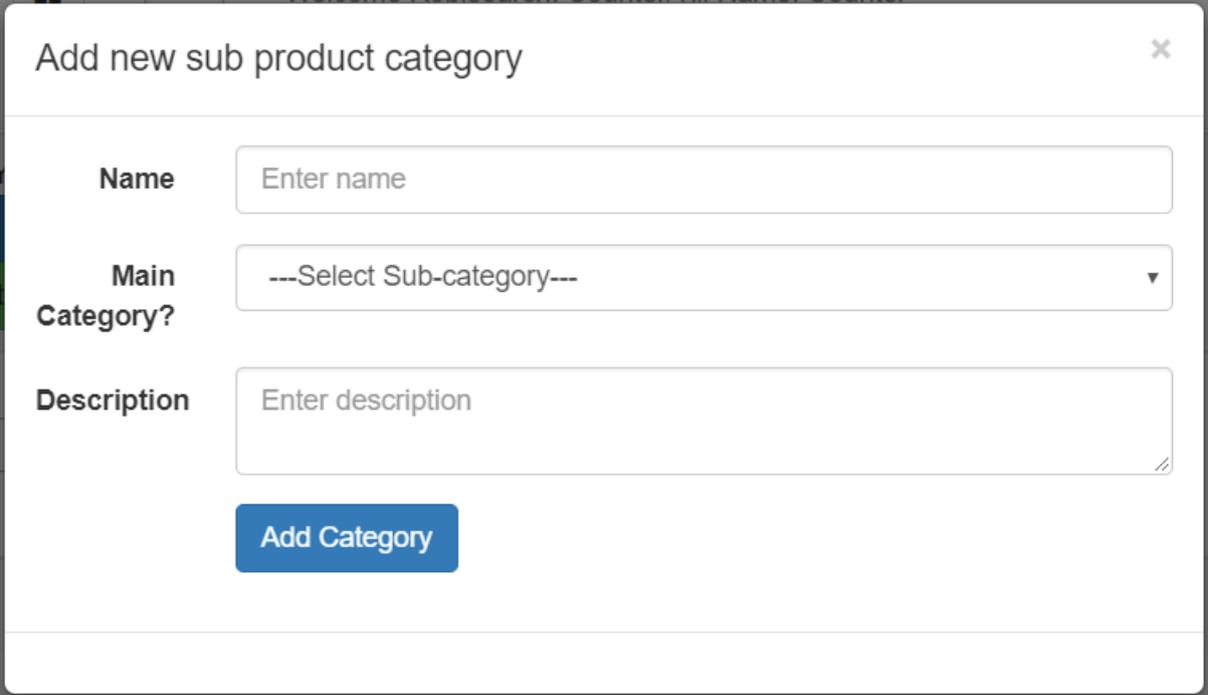
[Add Sub Category/group](#)
[download category](#)
[Category Bulk upload](#)
[View Main Category](#)

[View Unit of Measurement\(UOM\)](#)

10 records per page Search:

NO	Name	Main Category	Status	More
3	supa loaf	bread	active	<a href="#">More</a>

On clicking on subcategory, a form will pop up. Enter the details of the subcategory and specify in which category it is in.



The image shows a modal window titled "Add new sub product category" with a close button (X) in the top right corner. The form contains three input fields: a text field for "Name" with the placeholder "Enter name", a dropdown menu for "Main Category?" with the placeholder "---Select Sub-category---", and a text area for "Description" with the placeholder "Enter description". A blue button labeled "Add Category" is positioned below the description field.

Clicking on “view main category” you will be able to view all main categories.

Add Main Category View Sub Category View Unit of Measurement(UOM) View Measurement Category

10 records per page Search:

NO	Name	Description	Status	More
1	ELECTRICALS		active	More ▾
2	bread	sdfgn	active	More ▾

Clicking on “add main category”, a form will be able to pop up .Enter the name and description of the main category. Then click on “add main category” button.

### Add new main/parent product category ✕

**Name**

**Description**

[Add Main Category](#)

## View uom

Clicking on the “view UOM” button, you will be able to view all units of measurements.

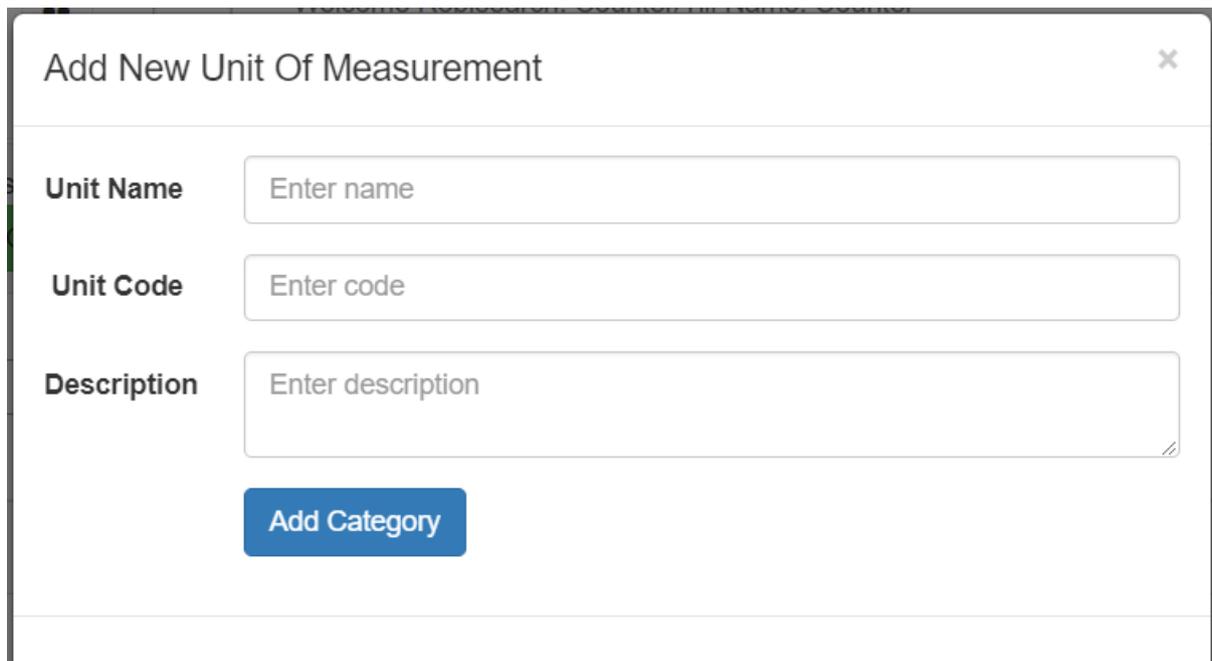
View Units of Measurements

[Add UOM](#)
[View Main Category](#)
[View Unit of Measurement\(UOM\)](#)

10 ▼ records per page Search:

NO	Unit Name	Code	Description	Status	More
1	Half	hlf		active	<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">More ▼</a>
2	No Units	NOU	No Units	active	<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">More ▼</a>
3	Dozen	dz	Dozen	active	<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">More ▼</a>
4	Bar	BR	Bar	active	<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">More ▼</a>
5	Packets	pcks	Packets	active	<a href="#" style="background-color: #007bff; color: white; padding: 2px 5px; border-radius: 3px;">More ▼</a>

The “add UOM” button will enable you add a new unit of measurement.



The screenshot shows a modal window titled "Add New Unit Of Measurement" with a close button (X) in the top right corner. The form contains three input fields: "Unit Name" with the placeholder text "Enter name", "Unit Code" with the placeholder text "Enter code", and "Description" with the placeholder text "Enter description". Below the input fields is a blue button labeled "Add Category".

## STOCKLIST (COUNTER)

Click on stock list module



How to view/download stock

Click on download/view product stocks

Code	Product Name	Drawer	Category	B.price	S.price	Wh.price	Qty	Branch	Uom	Edit	Transfer	Stock	More	Delete
78	Maize-		MEAT	160	200	180	55.00	Counter	Kg	Edit	Transfer	stock	More	Delete ▾
6778990	YOGHURTS-SDFGHJ	MAINSTORE	MEAT	20	50	30	42.00	Counter	bx	Edit	Transfer	stock	More	Delete ▾
6	beef-		MEAT	400	450	420	256.00	Counter	hlf	Edit	Transfer	stock	More	Delete ▾
asdefgrhj	mutton-		MEAT	400	500	480	46.00	Counter	Kg	Edit	Transfer	stock	More	Delete ▾
4	chicken-		MEAT	1500	2500	2000	205.00	Counter	Kg	Edit	Transfer	stock	More	Delete ▾
zsvdfg	mnbvc-		MEAT	1500	2000	1800	26.00	Counter	Kg	Edit	Transfer	stock	More	Delete ▾
123	pork-w3e4r		MEAT	100	120	1000	60.00	Counter	hlf	Edit	Transfer	stock	More	Delete ▾

Then fill the form below, then click on view/downloads button.do

### Stock Report ✕

---

**Counter**

**Action type**

[View /Download Stock](#)

How to upload a product list.

Click on product upload list button

Then on the form, click browse and select the product list you want to upload the click “upload product” button.

---

Please Upload Correct stocklist data(CSV) ×

---

**CSV LIST**  No file selected.

Upload correct format of CSV File here..

---

How to open a stock.

Click on open/close stock button on toolbar, then click on open stock button and fill the form.

After filling the form click the “open now” button.

---

Open stock ×

---

Are you sure you want to open the stock?

---

**Counter/branch**  ▼

**Opening Date**

Time: 15:29:56

How to close a stock,

Click on open/close stock, then click on close button then fill the form below. After filling the form click on “close” button.

Close stock ×

---

Are you sure you want to close the stock?

---

**Counter/branch**  ▼

**Close Date**  Time: 16:29:45

**Opening Date**

Download stock

✕

Are you sure you want to download the stock with this below closing date?

---

Counter/branch

Closing Date

Time: 16:29:45

## How to download stock

Click on open/stock button, then click on download button and fill the in the form then after filling the page, click “download now” button.

## Product main store

This module is where by a new product is added in the system. The **price** button allows the one with the role of changing product price to change the product price.

The button **Dispatch** is transferring a product from the main store to the counter.

The **stock** button enables one to add more stock of a product.

The **issue** button enables you to transfer a product from the main store for personal use by the business. For example yoghurt given to employees in a supermarket.

Code	Product Name	Drawer	Category	B.price	S.price	Wh.price	Qty	Uom	Edit	Price	Dispatch	Stock	Issue	More
56	bread-	breaddy	supa loaf	30	40	35	0.00	full	Edit	Price	Dispatch	stock	Issue	More ▾
78	Maize-		No Category	160	200	180	220.00	Kg	Edit	Price	Dispatch	stock	Issue	More ▾
6778990	YOGHURTS-SDFGHJ	MAINSTORE	No Category	20	50	30	82.00	bx	Edit	Price	Dispatch	stock	Issue	More ▾

The product bulk upload button enables you to upload products to the system in bulk. You can upload them in an excel sheet. You can the template by clicking on **download template** button.

## Manage Report

### DETAILED REPORT

No	Name
1	<a href="#">View Sales</a>
2	<a href="#">Sales Per Product</a>
3	<a href="#">Sales Per Product Category</a>
4	<a href="#">Sales Per Person</a>
5	<a href="#">Returned sales</a>
5	<a href="#">Fast/Slow moving goods</a>

## SUMMARY REPORT

No	Name
1	<a href="#">View Receipt Sales(All)</a>
2	<a href="#">Receipt Sales Per Person</a>
3	<a href="#">Receipt Sales Per Customer</a>
4	<a href="#">Money Mpesa Received</a>
5	<a href="#">Search/View Mpesa Pending</a>
5.1	<a href="#">Download Mpesa Contacts</a>
6	<a href="#">Daily collection Report</a>
7	<a href="#">User Logs</a>
8	<a href="#">Activity logs</a>
ACCOUNTING REPORTS	
1	<a href="#">Trial balance</a>
2	<a href="#">Balance sheet</a>
3	<a href="#">Profit and Loss</a>
4	<a href="#">Cash flow</a>
5	<a href="#">General Ledger</a>
6	<a href="#">Journal entry</a>

## Incoming stock list

This module is able to show you stock that is being transferred from the main store to the counter.

On clicking on the “incoming stock list”, you’ll be able to view the stock being transferred from the main store to the counter.

Invoice /P.O No	Name	total	Type	From	To	Added Date	Supplier	Added by	More
	Maize ()	20.00	Main Branch	supplier	Main	2018-12-13 09:03:32	No Supplier .	Admin	<a href="#">More ▾</a>
	Maize ()	200.00	Main Branch	supplier	Main	2018-12-13 09:02:41	No Supplier .	Admin	<a href="#">More ▾</a>
	beef ()	100.00	Main Branch	internal	Main	2018-12-10 17:24:26	No Supplier .	Admin	<a href="#">More ▾</a>

## Issued store items

In this module, you are able to view the items which were taken from the main store for personal use by the business. For example yoghurt given to employees in a supermarket.

Name	total	Added Date	Comments	Added by	More
YOGHURTS (SDFGHJ)	20	2018-12-10 11:30:37	REMOVED	Admin	More ▾
Total Quantity	20				

## Low stock list

In this module, you are able to view the products in the counter that have reached their re-order level. The re-order level of a product is stated when one is adding a new product in the system. It is usually among the details filled in the form after add product button is clicked on.

search Per Supplier
Search Per Product
Expired Products (Stoclist)

View low St

Search
Refresh

Code	Product Name	Category	Supplier	B.price	S.price	H.price	Qty	Branch	Exp Date More
123	pork-w3e4r	No Category .	jkuat	100	120	1000	0.00	Counter	0000-00-00 <span style="background-color: #2196F3; color: white; padding: 2px 5px; border-radius: 3px;">More</span>

## Low store

In this module, you are able to view the products in the main store that have reached their re-order level. The re-order level of a product is stated when one is adding a new product in the system. It is usually among the details filled in the form after add product button is clicked on.

search Per Supplier   Search Per Product   Expired Products (Mainstore) View low S

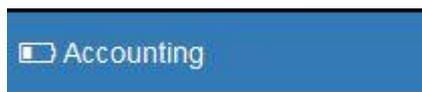
Search for product by name, code,description..   Search Refresh

Code	Product Name	Category	Supplier	B.price	S.price	H.price	Qty	Expiry Date	More Delete
56	bread-	supa loaf	UON	30	40	35	0.00	0000-00-00	<span style="background-color: #2196F3; color: white; padding: 2px 10px;">More</span> <span style="background-color: #2196F3; color: white; padding: 2px 10px;">Delete ▾</span>

## ACCOUNTING

How do I add an account?

Click on accounting module



You can view the account module here

Name	Account type	Description	Date created	More
ROBY	MPESA	GHIJKL	2018-12-10 11:39:37	<a href="#">More</a>
MPESA	MPESA		2018-12-10 12:21:49	<a href="#">More</a>
MPESA	No sub acc.	MPESA	2018-03-24 04:57:18am	<a href="#">More</a>
CASH	No sub acc.		2018-03-24 04:59:50am	<a href="#">More</a>
card	No sub acc.		2018-03-26 14:34:44pm	<a href="#">More</a>
BANK	No sub acc.	BANK	2018-03-24 05:00:12am	<a href="#">More</a>
Airtel Money	No sub acc.	MOBILE MONEY	2018-12-07 13:40:59	<a href="#">More</a>

Creating an account click on account type and fill in the form then click the button “add new account”.

### Add new Account type ✕

**Account Name:**

**Type**

**Description**

Description

[Add new Account type](#)

## View the account type created

No#	Name	Type	Description
1	Asset	BS	Asset
2	Liability	BS	Liability
3	Equity	BS	Equity
4	Income	PL	Income
5	Expense	PL	Expense
6	ROBY	BS	
7	ASSETS	PL	
8	LIABILITY	PL	
9	asset	PL	

## Creating general ledger account.

Click on add GL sub Groups, fill in the form.

No#	Sub-GI Account Name	Type	Sub Group Name	More
1	Banks	Asset	No sub Acc.	More ▾
6	Current asset	Asset	No sub Acc.	More ▾
7	Fixed assets	Asset	No sub Acc.	More ▾
8	Inventory assets	Asset	No sub Acc.	More ▾

Fill the GL form below.

## Add new Sub-GL Account



**Sub GL Account  
Name:**

Please provide your Account name

**Account type?**

---Select Sub Account type---

**Sub group  
name?**

---No sub group---

Add Sub-groups

## HOW TO ADD PAYMENT METHOD

Click on add payment method.

**Success!** You have successfully added anew payment method!

[Add Payment Methods](#)
[GL Sub Groups](#)
[Charts of Account](#)
[Account Types](#)
[Receive Payments](#)
[View Payment Methods](#)

10 records per page Search:

Name	Account type	Description	Date created	More
Airtel Money	No sub acc.	MOBILE MONEY	2018-12-07 13:40:59	<a href="#">More</a>
atm	BANK		2018-12-14 14:14:27	<a href="#">More</a>
BANK	No sub acc.	BANK	2018-03-24 05:00:12am	<a href="#">More</a>
card	No sub acc.		2018-03-26 14:34:44pm	<a href="#">More</a>
CASH	No sub acc.		2018-03-24 04:59:50am	<a href="#">More</a>
MPESA	MPESA		2018-12-10 12:21:49	<a href="#">More</a>
MPESA	No sub acc.	MPESA	2018-03-24 04:57:18am	<a href="#">More</a>

Fill in the form below. Click add GL Account

## Add new GL Account



<b>GL Code:</b>	<input type="text" value="4567890"/>
<b>Account Name:</b>	<input type="text" value="pettycash"/>
<b>Account Group type?</b>	<input type="text" value="---Select Sub Group type---"/>
<b>Sub Account name?</b>	<input type="text" value="---Select Sub Account name---"/>
<b>Opening Date</b>	<input type="text" value="2018-12-14 14:03:44"/>
<b>Opening Balance:</b>	<input type="text" value="0"/>
<b>Currency</b>	<input type="text" value="Select Currency"/>

## Purchases

This module keeps record of what the business is purchasing from suppliers.

Add	Invoice No	Amount	Paid	Balance	VAT	Taxable	Invoice Date	Paid Date	Pin	Supplier	Remarks	Pay	More
<a href="#">Add</a>	345767878	50000	0.00	50000	6896.55	43103.45	2018-11-21 18:05:43	2018-11-21 18:05:43	452e36366	UON	n/a	<a href="#">Pay Now</a>	<a href="#">More</a>
<a href="#">Add</a>	23234455253	200	200.00	0	27.59	172.41	2018-11-09 17:51:41	2018-11-09 17:51:41	34344234232	jkuat		<a href="#">Pay Now</a>	<a href="#">More</a>
Total amount		50,200.00											

When you click on add new purchase button, you form pop up appears. Enter all the details of that purchase including the invoice number. Then click on “add purchase” button.

Add new Purchases ×

Invoice / Receipt No :

Invoice Date :

From supplier? :

Supplier Pin :

Payment Date :

Total Amount :

vat type? :

VAT Rate :

VAT Amount :

Taxable Amount :

Remarks :

The quotation is what we are sending to the buyer to tell them the prices of our products. When you click on view quotation, click on add quotation. Enter the details of the quotation

Add new quotation ×

**Requested by:**

**Customer Details**

**Quotation No:**

**Ref No:**

**Quotation Date**

**Valididty Date**

**Terms of quotation**

**Total Amount**

**Prepared by:**

**Note/Message**

**Shipping to?**

The purchase order is what you send to the supplier or seller about what you want to purchase from them.

Clicking on “purchase order”, you’ll be able to view all the p.orders.

Add P.Order Search for Purchases Order

Purchases Quataion Purchase order Sales order Budget

There was no purchase found in the system

View	P.O No	Amount	P.Order Date	Expiry Date	Entry Date	Supplier	R
Total amount		<input type="text"/>					

0 Purchases (s) in the system.

Click on “add purchase order”, the form will pop up.

Enter the details and click on create new purchase order.

### Add new Purchase Order ×

<b>Supplier ?</b>	<input type="text" value="---Select Customer/supplier/vender---"/>
<b>P.Order No:</b>	<input type="text" value="*****1"/>
<b>P.Order Date</b>	<input type="text" value="2018-12-17 16:42:22"/>
<b>Exp Expiry Date</b>	<input type="text" value="2018-12-17 16:42:22"/>
<b>Ordered by:</b>	<input type="text" value="Enter contact Name for P.O"/>
<b>Terms of payment</b>	<input type="text" value="Enter Terms of payment"/>
<b>Freight On Board</b>	<input type="text" value="Enter person in charge"/>
<b>Total Amount</b>	<input type="text" value="Please total amount"/>
<b>Delivery Method:</b>	<input type="text" value="Please provide delivery method"/>
<b>Shipping to details..</b>	<input type="text" value="Shipping to details."/>
<b>Note/Message</b>	<input type="text" value="Bussines/comments/note"/>

[Create new Purchase Order](#)

Same with sales order. A sales order is what the business will send to the buyer when delivering the products sold.

[Add Sales Order](#) [Search for Sales Order](#)

[Purchases](#) [Quotation](#) [Purchase order](#) [Sales order](#) [Budget](#)

There was no purchase found in the system

View	S.O No	Amount	Order Date	Expiry Date	Entry Date	Supplier	Remarks
Total amount							

## EXPENSES

An expense consists of the economic costs a business incurs through its operations to earn revenue.

When you click on expense module, you'll be able to view all expenses.

[Add Expense](#) [Add bill/Supplier invoice](#) [Pay bills](#) [All Invoices](#) [Receive Payments](#) [All Debtors](#) [View Expenses](#)

More	Supplier	P.O No	Bank Name	Amount	Name	Date Paid	Approved by?	Description	Status	Action	More
More	jkuat		PETTY CASH	1200	Mary	2018-12-07 11:50:23	mr robert		active	<a href="#">View document</a>	<a href="#">More ▾</a>
Balance		1200									

Click on add expense. The form below will pop up.

Enter all details

Add new Expense ✕

Company

Bank name?

Ref No

Amount

Name?

Invoice /P Order/Sales Order No

Contact

Approved by?

Date

Upload Document  No file chosen

Description

The more button will give more information about the expense.

More

Back DAILY EXPENSES

Bank name?	<input type="text" value="PETTY CASH :Balance=237775"/>	Payee ?	<input type="text" value="JULIANA"/>
Date captured	<input type="text" value="2018-12-07 11:52:05"/>	Paid Date	<input type="text" value="2018-12-07 11:50:23"/>
Invoice /Purchase Order No	<input type="text" value="Enter Invoice or Purchase Order Number if any"/>	Contact	<input type="text" value="Enter contact"/>
Ref NO	<input type="text" value="EXP-11544172623"/>	Description/Note	<input type="text" value="Bussines/comments/note"/>
Approved by?	<input type="text" value="mr robert"/>	Amount	<input type="text" value="1200"/>

Account:	Description:	Ref No:	Total	Customer	Save
<input type="text" value="Select Account"/>	<input type="text" value="Enter description"/>	<input type="text" value="N/A"/>	<input type="text" value="amount"/>	<input type="text" value="---Select Customer/supplier"/>	<input type="button" value="Add Account Expense"/>
Food Expense		N/A	600	jkuatMoses	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Item Name/Code:	Qty:	Description:	Rate:	Total:	Customer:
<input type="text" value="Enter code or name"/>	<input type="text" value="1"/>	<input type="text" value="description"/>			<input type="text" value="---Select Customer/supplier/ve"/>
There is no data found..					
TOTAL MONEY SPENT:				Total:600.00	

The add bill/supplier invoice

This button enables you to record any bill that the business has.

View Bills

More	Supplier	Amount	Contact Person	Billing Paid	Due Date	Approver	Description	Status	Payments	More
There no records found..										
	Balance									

0 Records in the system.

Click on “add bill” button to add the details of the specific bill.

Add new Bill
×

**Supplier ?**

**Ref No**

**Bill No**

**Total Bill Amount**

**Contact Person?**

**Approved by?**

**Bill Date**

**Due Date**

**Payment terms**

**Memo/Description**

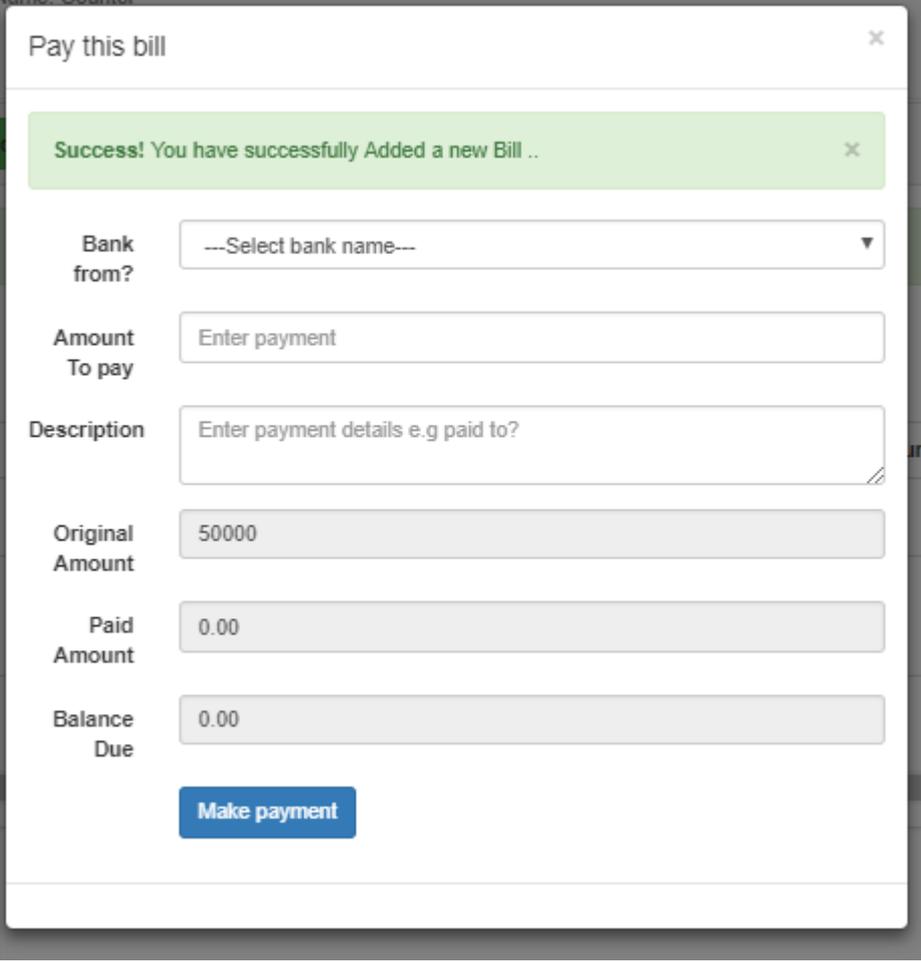
[Add Bill](#)

[View all Bills](#)
[View Expense](#)
[Add bill/Supplier invoice](#)
[All Invoices](#)
[Receive Payments](#)
[All Creditors](#)
[View pending Bill](#)

#### PAY PENDING BILLS

More	Bill No	Due Date	Supplier	Amount	Balance	Paid Amount	Payment	More
<a href="#">More</a>	1	2018-12-06 15:33:17	jkuat	50000	0.00	0.00	<a href="#">Pay Now</a>	<a href="#">View Payments</a>

The pay now button enables you to record the payment of the bill. Then click on make payment.



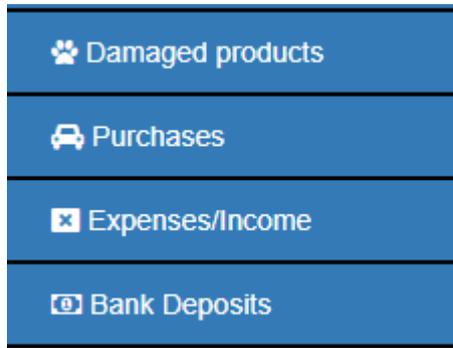
The screenshot shows a web form titled "Pay this bill" with a close button (x) in the top right corner. A green success message banner at the top reads "Success! You have successfully Added a new Bill .." with a close button (x). Below the banner are several input fields and a button:

- Bank from?**: A dropdown menu with the text "---Select bank name---" and a downward arrow.
- Amount To pay**: A text input field containing the placeholder text "Enter payment".
- Description**: A text input field containing the placeholder text "Enter payment details e.g paid to?".
- Original Amount**: A text input field containing the value "50000".
- Paid Amount**: A text input field containing the value "0.00".
- Balance Due**: A text input field containing the value "0.00".
- Make payment**: A blue button with white text.

## Bank deposits

This is where by any payment received by the business is recorded in the various bank accounts.

Click on the bank deposit module.



You will be able to view all the bank deposits.

View	Bank Name	Recorded by	Responsible Person	Description	Amount	Date Deposited	More
<a href="#">More</a>	EQUITY BANK	Admin	robert	daily sales	70000	2018-10-27 12:27:12	<a href="#">More</a>
<a href="#">More</a>	General.	Admin	james	sales	90000	2018-10-25 09:11:09	<a href="#">More</a>
<a href="#">More</a>	EQUITY BANK	Admin	all		85000	2018-10-24 06:44:53	<a href="#">More</a>
<a href="#">More</a>	EQUITY BANK	Admin	James		77000	2018-10-22 21:08:59	<a href="#">More</a>

Click on add bank deposit button to add a new deposit to the bank.

The form below will pop up .Select the bank.

### Add new Bank Deposits ✕

**Bank name?**

**Person incharge**

**Amount :**

**Banking Date**

**Remarks**

Click on the more button to update the bank deposit.

---

More

---

Update/Create Bank deposits [Back](#)

Bank name? EQUITY BANK :Balance=-66600 Person In Charge: robert

Date captured 2018-10-27 12:27:29 Deposited Date 2018-10-27 12:27:12

Ref NO BANK-11540632432 Description daily sales

[Update Bank deposit](#) [Print Bank deposit](#) Amount 70000

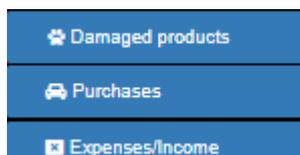
From:	Account:	Description:	Ref No:	Total	Save
<a href="#">Select Customer/supplier</a>	<a href="#">Select Account</a>	<input type="text" value="Enter description"/>	<input type="text" value="refno"/>	<input type="text" value="amount"/>	<a href="#">Add</a>

There is no data found..

TOTAL MONEY DEPOSITED:	Total:
------------------------	--------

## Damaged products

If a product gets damaged, it is recorded in the damaged products module.



Click on add damaged product button to add the product. The form below will appear. Enter the products details and click on “Add damaged product” button.

Add new damaged products ×

Product name :

Quantity :

Person incharge

Date damaged

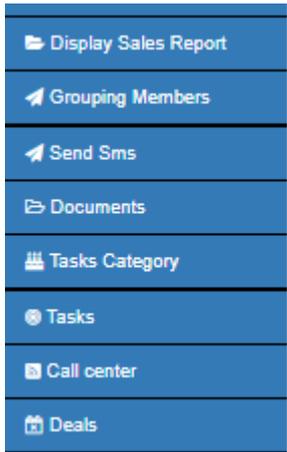
From?

Remarks

## Display sales report

This module enables you view all sales per counter within stated dates.

Click on “display sales report “module.



Click on “View receipt sales” button.



Enter the details on click on “view sales” button. You will be able to view the sales that were made within the dates stated.

Group Sales Report

Counter: Counter

Sales Status: ---All/Any sales status---

From Date: 2018-12-14 00:00:00

To Date: 2018-12-14 13:59:59

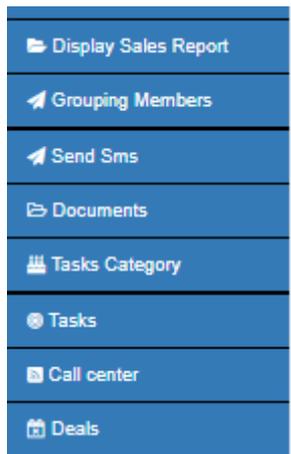
Display type?: No i want to just view sales

View Sales

## Grouping members

This module enables you to view the categories of people and the members assigned to these categories.

Click on the “Grouping members” module.



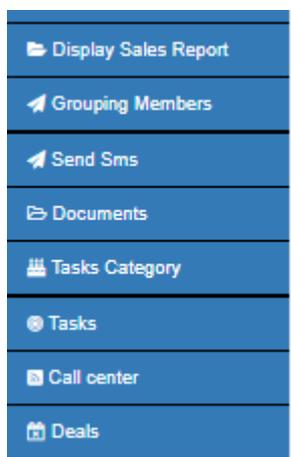
You'll be able to view all the groups.

View category/group				
Name	Description	Status	Old Members	Current Members
Cooks		active	<a href="#">Old Group</a>	<a href="#">Current Group</a>
sweepers	j	active	<a href="#">Old Group</a>	<a href="#">Current Group</a>
graduates	tyyuiioop	active	<a href="#">Old Group</a>	<a href="#">Current Group</a>

## Send sms

This module enables you to send bulk sms to your people/contacts associated with the business.

Click on the module.

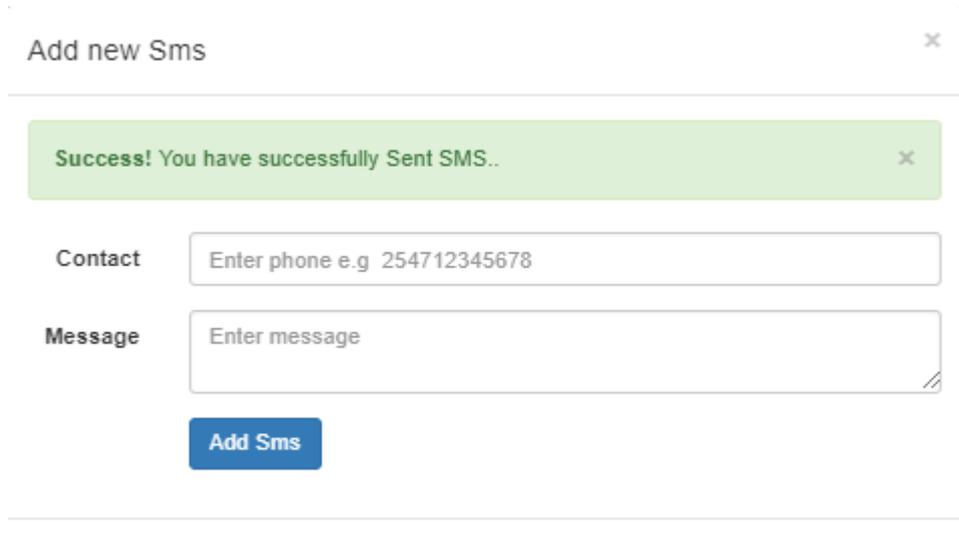


You'll be able to view all the sms sent before.

Contact	Date	Message	Sent By?	Status
254710753092	2018-12-14 14:04:04	hello Null!Welcome to robisearch	Admin	active
254721150817,254722284978	2018-11-02 17:01:51	welcome to www.bulksmschapchap.com	Admin	active

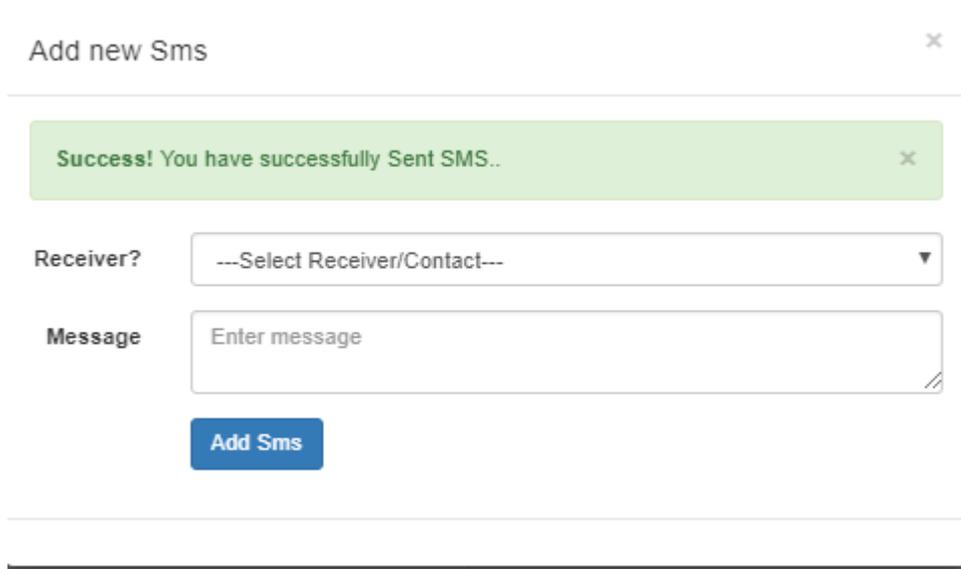
When you want to send a sms to a contact that is not in the system, you can click on **ADD General sms** button.

Enter the contact then the message then click on **Add sms** button.



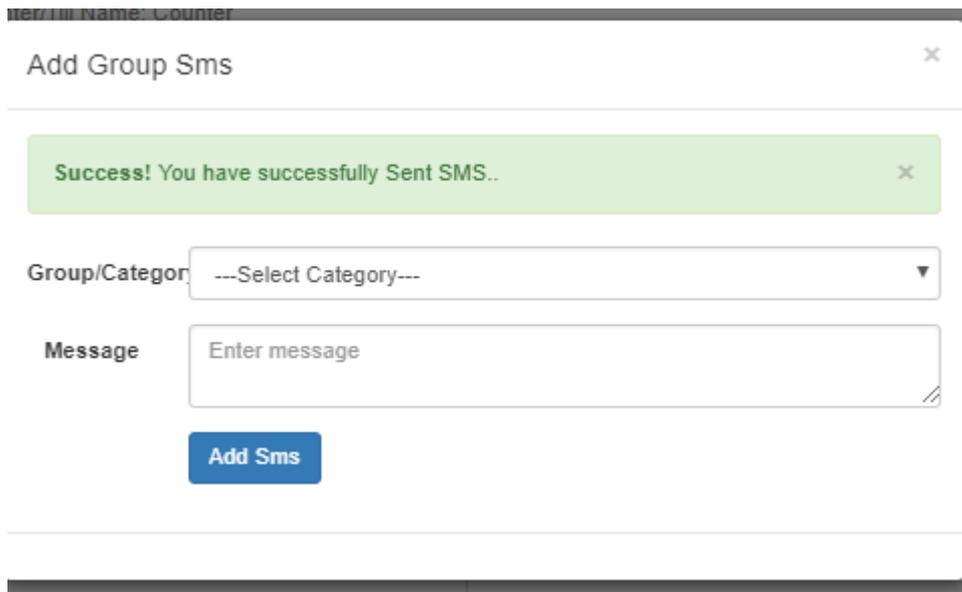
The image shows a web interface for adding a new SMS. At the top, there is a header 'Add new Sms' with a close button (x). Below the header is a green success message: 'Success! You have successfully Sent SMS..' with a close button (x). Underneath, there are two input fields: 'Contact' with the placeholder text 'Enter phone e.g 254712345678' and 'Message' with the placeholder text 'Enter message'. At the bottom of the form is a blue button labeled 'Add Sms'.

When you want to send an sms to a contact that is in the system, you can click on *ADD* customized sms button. Choose the contact then the message then click on *Add sms* button.



The image shows a web interface for adding a new SMS. At the top, there is a title "Add new Sms" with a close button (x). Below the title is a green success message: "Success! You have successfully Sent SMS..". Underneath, there are two input fields: "Receiver?" with a dropdown menu showing "--Select Receiver/Contact--" and "Message" with a text area containing "Enter message". At the bottom of the form is a blue button labeled "Add Sms".

When you want to send an sms to a group/category who are in the system, you can click on ADD Group sms button. Choose the group/category then the message then click on Add sms button.



Header: Counter

### Add Group Sms

Success! You have successfully Sent SMS..

Group/Category: ---Select Category---

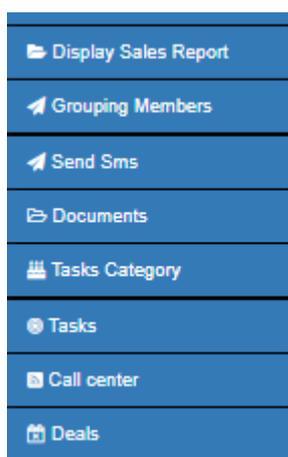
Message: Enter message

Add Sms

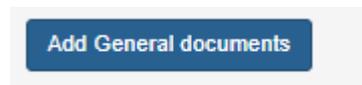
## Documents

This module enables you to upload the documents of the business.

Click on the “Documents” module.



Click on the “Add general documents” button.



Enter the details of the document then upload the document.

Click on “Add documents” button.

A screenshot of a web form titled "Add new documents" with a close button (x) in the top right corner. The form contains several input fields: "Upload Document" with a "Choose Files" button and "No file chosen" text; "document name" with a text input field; "Doc Number/ code" with a text input field; "Category" with a text input field; "Entry Date" with a text input field containing the placeholder "dd/mm/yyyy"; and "Comment" with a larger text input field. At the bottom of the form is a blue "Add documents" button.

Add new documents

Upload Document  No file chosen

document name

Doc Number/ code

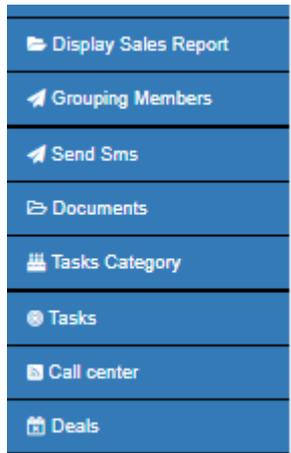
Category

Entry Date

Comment

## Task category

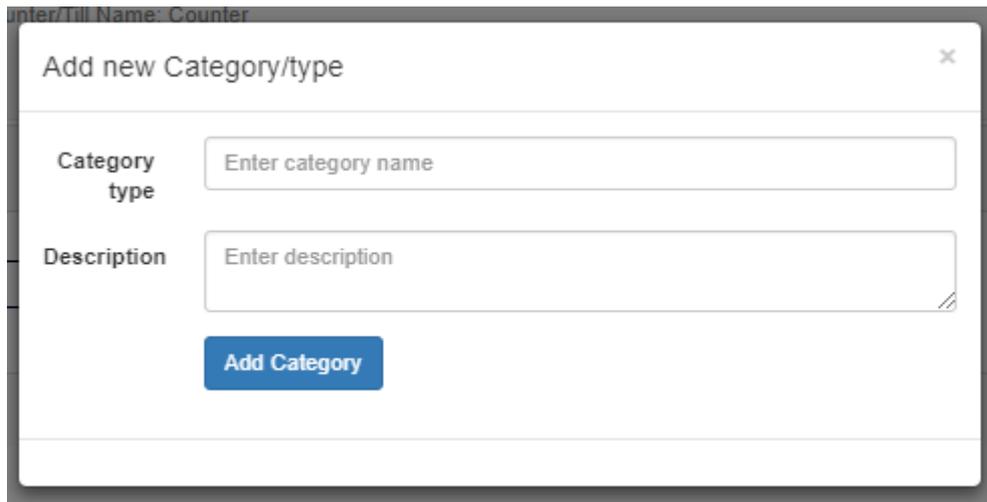
This is where by you create the categories of various tasks in the business .Click on “Tasks category” module.



You will be able to view all the task categories added before into the system. Click on the “add task category” button to add a new task category.



A form will pop up. Enter the category type and its description then click on “Add category” button.



Enter/Till Name: Counter

Add new Category/type

Category type

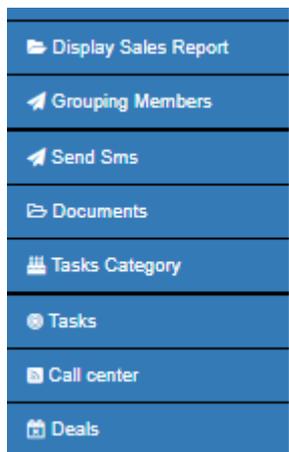
Description

Add Category

## Tasks

This module is where by tasks are assigned to the users.

Click on the Task module.



You'll be able to view all the tasks.

Add Task View t

Staff?

Date	Task Owner	Subject	From Date	Due Date	Supervisor	status	Category	View/Edit	Progress	View Progress	Delete
------	------------	---------	-----------	----------	------------	--------	----------	-----------	----------	---------------	--------

Click on the “add task” button. A form will pop up.

Enter the details of the task then click “add task”.

Add new Task ✕

Category?

Assigned to?

Subject

Start Date

Due Date

Contact

Status ?

Priority ?

Email Notification ?

Task repeated?

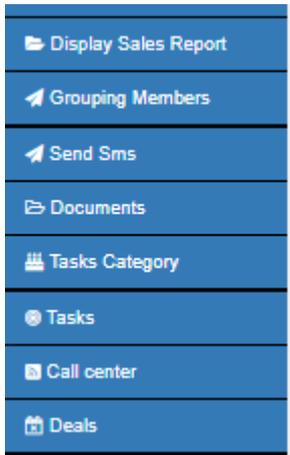
Supervisor?

Description

## Call centre

In this module, all the calls received in the business are recorded.

On the dashboard, click on the “call centre” module.



You'll be able to view all the record of all the calls received

Add New Calls View complains

Search Refresh

Date	Category	Subject	Caller	Receiver	Phone	Media	Description	Status	More
------	----------	---------	--------	----------	-------	-------	-------------	--------	------

Click on “add new calls” button.

A form will pop up. Enter the details of the received call. Then click on “add calls” button.

Add new calls ✕

---

**Category?**

**Call Subject**

**Caller Names**   
*Name of the person who called?*

**Caller Number**

**Receiver Name**   
*Who received the call?*

**Media / Mode**   
*How did customer know us*

**Call Date**

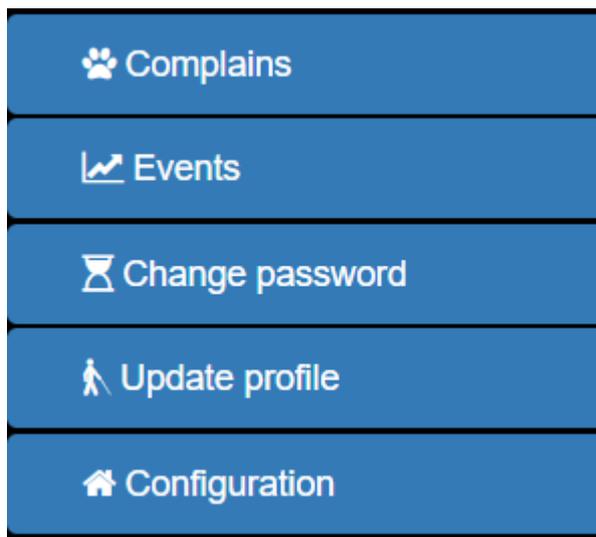
**Description**

**Status?**

## Complains

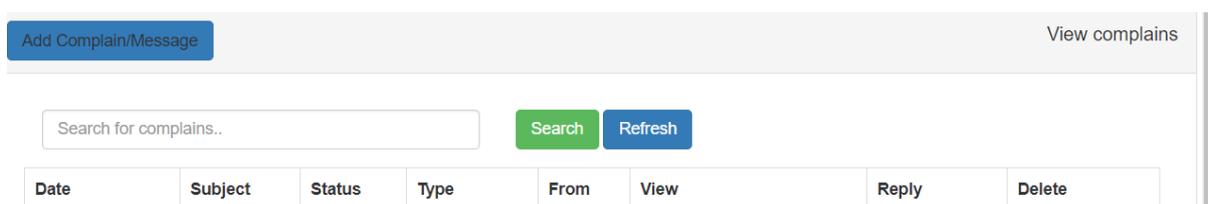
In this module, the users of the system specifically the employees can post their complaints in this module.

Click on the “complains” module.

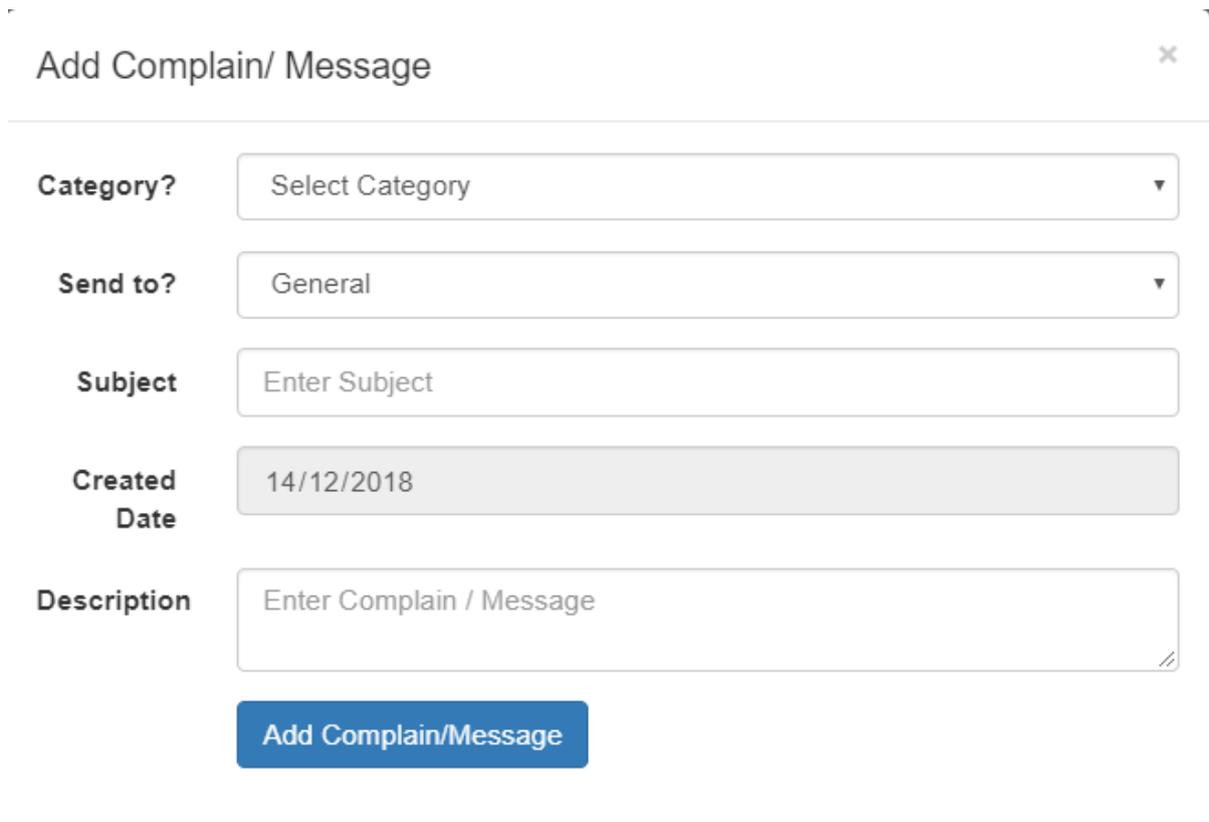


You’ll be able to view all the complaint messages sent before.

Click on “add complain/message” button



A form pops up, enter the details and click on “add complain/message” button.



The screenshot shows a modal window titled "Add Complain/ Message" with a close button (X) in the top right corner. The form contains the following fields:

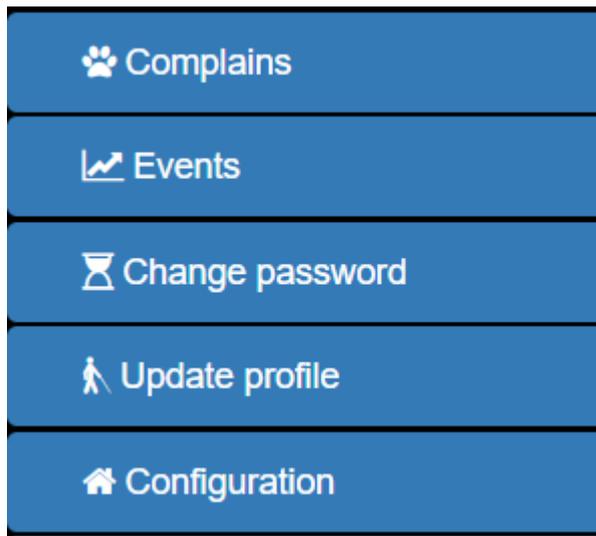
- Category?**: A dropdown menu with the text "Select Category" and a downward arrow.
- Send to?**: A dropdown menu with the text "General" and a downward arrow.
- Subject**: A text input field with the placeholder text "Enter Subject".
- Created Date**: A text input field with the value "14/12/2018".
- Description**: A text area with the placeholder text "Enter Complain / Message" and a double-slash icon in the bottom right corner.

At the bottom of the form is a blue button labeled "Add Complain/Message".

## Events

In this module, events in the business are recorded here in the system.

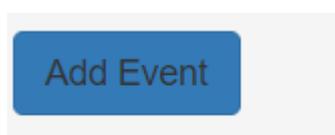
Click on the “Events” module in the dashboard.



You will be able to view all the events that were added into the system before.

Add Event		View viewevents						
Event Title	From Date	To date	Location	Host	Partisipants	Repeated?	Status	More
business ventures event	2018-12-27	2018-12-29	juja	Robisearch ltd	employees	No	pending	Delete ▾

Click on the “Add event” module.



A form will pop up. Enter the details of the event. Then click on “add events” button.

## Add new Event

**Event Location**

Enter Event's location

**Event title**

Enter title

**Start Date**

dd/mm/yyyy

**Due Date**

dd/mm/yyyy

**Event Host**

Enter Your host or Controller

**Status?**

---new--

**Event repeated?**  
?

---Yes--

**Participants**

Enter participants

**Comments**

Enter comments

**Add Events**

## Change password

This module is where one changes the password of the system. Enter the old password then the new password then confirm new password.

Click on “save /update password” button.

Password Details

<b>Old Password</b>	<input type="text" value="e.g. enter old password first"/> Enter Your Old Password here..
<b>New Password</b>	<input type="text" value="Enter Your New password"/> Enter Your New Password
<b>Confirm New Password</b>	<input type="text" value="Confirm Your New password"/> Confirm Your New Password

## Contact us for enquiries,

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